

FIG 1

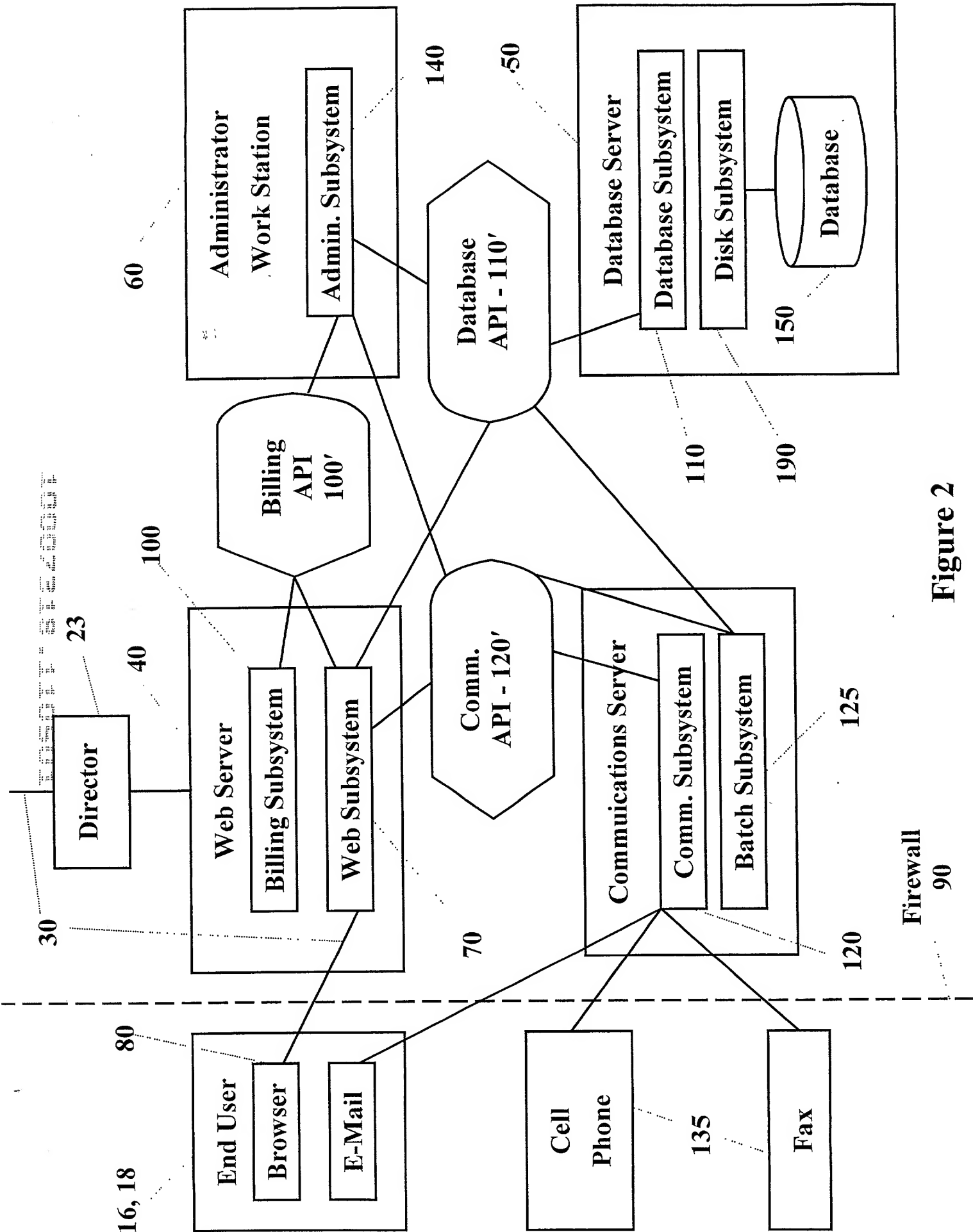
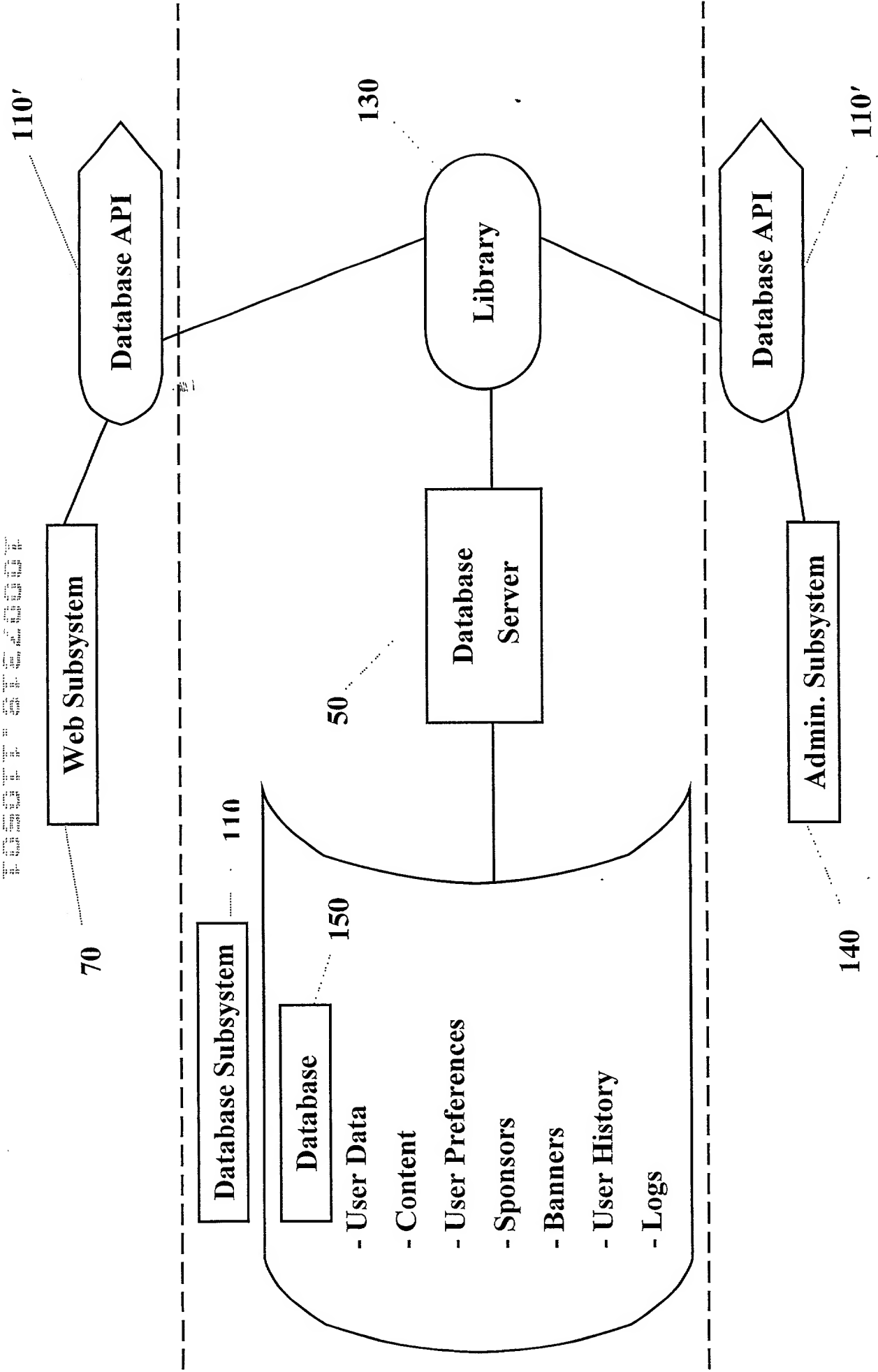


Figure 2



**Figure 3**



**Banners**



**Announcements**



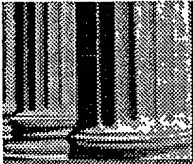

**Reporting**

Ways to promote your services - see 50 banners available for your use.

Communicate more effectively - over 65 examples to use

State of the art OLAP cubes

F164

 <b>OBERMAYER REBMANN MAXWELL &amp; HIPPEL LLP</b>	
Philadelphia, PA   Harrisburg, PA   Pittsburgh, PA   Cherry Hill, NJ   Vineland, NJ   Wilmington, DE	
<a href="#">Home</a>   <a href="#">Firm Overview</a>   <a href="#">Practice Areas</a>   <a href="#">Attorneys</a>   <a href="#">Contact Us</a>   <a href="#">Offices</a>   Friday, October 19, 2001	
	
<a href="#">Change Categories</a>   <a href="#">Add Team Member</a>   <a href="#">Task Report</a>   <a href="#">New Task</a>   <a href="#">Refer Associate</a>   <a href="#">Unsubscribe</a>   <a href="#">Feedback</a>   <a href="#">Help</a>	
Hi, Jane. Here are your BizActions interest items and reminders for today:	
<b>Obermayer Rebmann Maxwell &amp; Hippel Announcements</b>	
<b>2001 Fall Seminars</b> <span style="float: right;">SB1048</span>	
Our Labor Relations and Employment Law Department will be hosting two Breakfast Briefings this Fall. The first of the two seminars, "The FLSA: Why Salaried Doesn't Always Mean Exempt", will be held on October 10, 2001 and the second seminar, "The ABC's of EPLI" will be held on November 14, 2001.	
<a href="#">More Info</a>   <a href="#">Tasks</a>   <a href="#">Contact Me</a>	
<b>Corporate and Business</b>	
<b>What is a Private Offering of Securities and Should Your Company Make One?</b> <span style="float: right;">BR6</span>	
New entrepreneurs and venture businesses are faced with a complex array of options when it comes to raising significant capital for start-up, expansion, and other needs. Aside from "Angel Investment", family money, revolving lines of credit, and mezzanine financing, one popular and effective means of raising capital is through a "private placement" of securities by your company. But what exactly is a private placement and how does it work? Copyright©, 2001	
<a href="#">Full Article</a>   <a href="#">Tasks</a>   <a href="#">Contact Me</a>   <a href="#">Books</a>	
<b>Estate, Probate and Trusts</b>	
<b>Three Important Auxiliary Estate Documents</b> <span style="float: right;">BR9</span>	
Three auxiliary documents are particularly important to include in a portfolio of information pertinent to your estate. These are a General Durable Power of Attorney, an Advance Health Care Declaration and Personalized Instructions. Such information provides very helpful supplements to your will and related materials. Copyright©, 2001	
<a href="#">Full Article</a>   <a href="#">Tasks</a>   <a href="#">Contact Me</a>   <a href="#">Books</a>	
<b>Employment and Labor</b>	

200

211

202

204

206

## Questions and Answers for Employers on Military Leave Under The Uniformed Services Employment and Reemployment Rights Act

BR13

An important question for many employers in the near future may be to determine their responsibilities to employees who are called to military service. The Uniformed Services Employment and Reemployment Rights Act clarifies issues such as eligibility, leave requirements, benefits and conditions of reinstatement. Copyright©, 2001

[Full Article](#)

[Tasks](#)

[Contact Me](#)

[Books](#)

## Bankruptcy

### Bankruptcy: Fresh Start Choices For Start-Up Companies

BR510

Unfortunately, the recent economic decline has left many new start-ups with no alternative but to consider what options may exist for them in bankruptcy or reorganization. Although "bankruptcy" has often carried a negative stigma, depending upon which type of bankruptcy a company chooses, it may actually allow a company to either totally dissolve or simply reorganize its debt in order to emerge stronger and more efficient for the future. Copyright©, 2001

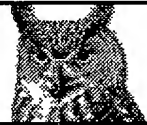
[Full Article](#)

[Tasks](#)

[Contact Me](#)

[Books](#)

Do you want to make wise investments?



[Change Categories](#)

[Add Team Member](#)

[Task Report](#)

[New Task](#)

[Refer Associate](#)

[Unsubscribe](#)

[Feedback](#)

[Help](#)

## Your Business Reminders

### Evaluation

Due Date: November 08, 2001

Schedule semi-annual evaluations for direct hires

[Forward/Assign](#)

[View Report](#)

[Edit Task](#)

[History](#)

[Mark Complete](#)

## Your Personal Reminders

### Anniversary

Due Date: October 08, 2001

Don't forget to buy an anniversary present

[Forward/Assign](#)

[View Report](#)

[Edit Task](#)

[History](#)

[Mark Complete](#)

You owe it to your family...

[Update Profile](#)

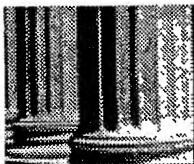
[Unsubscribe](#)

[Privacy](#)

[Disclaimer](#)

© 2001, BizActions, LLC

FIG 4



OBERMAYER REBMAN  
MAXWELL & HIPPEL LLP

Philadelphia, PA Harrisburg, PA Pittsburgh, PA Cherry Hill, NJ Vineland, NJ Wilmington, DE

| [Home](#) | [Firm Overview](#) | [Practice Areas](#) | [Attorneys](#) | [Contact Us](#) | [Offices](#) | Tuesday, October 30, 2001

**BizActions™** for Your Employees

**Grow Your Business One Message at a Time...**

| [Interests](#) | [Add Team Member](#) | [Report](#) | [New Task](#) | [Refer Associate](#) | [Unsubscribe](#) | [Feedback](#) | [Help](#) |

Full Article

## 2001 Fall Seminars

BA1048

**October 10, 2001, Wednesday**

*The FLSA: Why Salaried Doesn't Always Mean Exempt*

Learn the difference between exempt and non-exempt, how to handle employees who work in several locations and/or at different rates of pay and how to classify difficult job descriptions, including, for example, information technology personnel. Bring your problem job descriptions along!

### Location:

Wyndham Franklin Plaza Hotel  
17th & Race Streets  
Philadelphia, PA

### Time:

Registration & Continental  
Breakfast - 8:00 a.m. to 8:30 a.m.  
Program - 8:30 a.m. to 10:30 a.m.

### Presenters:

Lori E. Halber & Jacqueline Z. Shulman

*Please register by Wednesday, October 3, 2001.*

**November 14, 2001, Wednesday**

*The ABC's of EPLI*

Are you thinking about employment practices liability insurance? Employers increasingly are looking to EPLI to insure against the potential liabilities arising out of personnel decisions made in today's litigious workplace. The insurance market is no place for the uneducated consumer. The ABCs of EPLI will explain what you should be looking for and what you should avoid in an EPLI policy.

### Location:

Wyndham Franklin Plaza Hotel  
17th & Race Streets  
Philadelphia, PA

**Time:**

F165

**Time:**

Registration &amp; Continental

Breakfast - 8:00 a.m. to 8:30 a.m.

Program - 8:30 a.m. to 10:30 a.m.

**Presenters:**

James M. Penny, Jr. &amp; Joseph J. Centeno

*Please register by Wednesday, November 7, 2001.*

*For Reservations:* Call the Breakfast Briefing Registration Hotline (215) 665-3100; e-mail us at [info@obermayer.com](mailto:info@obermayer.com) ; or register on-line.

*Cost:* There is no charge for these briefings.

When you register, let us know what issues you would like us to address.

Please note that seating is limited, so advance registration is required.

Click [here](#) to add this item as a task.

E16 (cont)  
5 cont

**Your Comments**

Is this item worthy of consideration of implementation?	Yes	<input type="radio"/>	No	<input type="radio"/>	Maybe	<input type="radio"/>
Is this item worth sharing with other associates?	Yes	<input type="radio"/>	No	<input type="radio"/>	Maybe	<input type="radio"/>
Did this item present value to you and your business?	Yes	<input type="radio"/>	No	<input type="radio"/>	Maybe	<input type="radio"/>
Comments:						
<div><div></div><div></div></div>						
<input type="button" value="Submit Your Comments"/>						

**BizActions™** for Your Customers

Grow Your Business One Message at a Time...

[Update Profile](#)[Unsubscribe](#)[Privacy](#)[Disclaimer](#)

© 2000, BizActions, LLC

# OBERMAYER REBMANN MAXWELL & HIPPEL LLP

## Overview of Sample Interest Categories

- 1 - Sponsor selects initial default Interest Categories to deliver to
- 2 - Users can change Interest Categories at any time.
- 3 - BizActions™ technology builds a SINGLE custom email for each based on their Interest Category selections.
- 4 - BizActions™ delivers weekly articles for each Interest Category

With BizActions, your client controls the information and reminders that they want to receive. The BizAct interest categories are expanding all of the time, as we develop additional areas of content. The following are the Interest Categories available for selection. The standard pricing includes a selection of any 9 categories. Additional categories may be purchased in groups of 3.

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Administrative | <input checked="" type="checkbox"/> Entertainment               |
| <input type="checkbox"/> Automotive/Lemon          | <input checked="" type="checkbox"/> Environmental               |
| <input type="checkbox"/> Banking & Finance         | <input checked="" type="checkbox"/> Estate, Probate, and Trusts |
| <input checked="" type="checkbox"/> Bankruptcy     | <input checked="" type="checkbox"/> General Litigation          |
| <input checked="" type="checkbox"/> Commercial     | <input type="checkbox"/> Intellectual Property                  |
| <input checked="" type="checkbox"/> Construction   | <input type="checkbox"/> Internet and New Media                 |
| <input type="checkbox"/> Corporate & Business      | <input checked="" type="checkbox"/> Medical and Health Care     |
| <input checked="" type="checkbox"/> Family         | <input type="checkbox"/> Personal Injury                        |
| <input type="checkbox"/> Employment & Labor        | <input checked="" type="checkbox"/> Real Estate                 |

All articles have been reviewed by the law firm of Obermayer Rebmann & Hippel LLP based in Philadelphia. For additional information, please contact the fields at [sfields@obern](mailto:sfields@obern)

214

Category Descriptions

To Law  
Center

Disclaimer

Privacy Statement

Feedback

Press Releases

What's New

Copyright 2001

F166



F16 (cont)

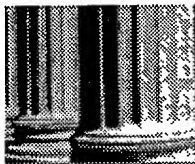
### Create Sponsor Default Interest Preferences

As a sponsor, you can preset the default interest categories for all new members, prospects and referrals that fall under your sponsorship. You should select categories that are most relevant to your client base. Keep in mind that these are just defaults. Members may reset these at any time after enrollment. Please note that if you do not assign a point of contact to a category that you select, we will automatically assign the lead sponsor point of contact to that category.

Select	Interest Category	Topic	Contact Person
<input checked="" type="checkbox"/>	Sales	Primary Category	
<input checked="" type="checkbox"/>	Sales	Management	
<input type="checkbox"/>	Sales	Opportunities and Support	
<input type="checkbox"/>	Sales	Pricing	
<input checked="" type="checkbox"/>	Marketing	Primary Category	
<input checked="" type="checkbox"/>	Marketing	Marketing Plans	
<input type="checkbox"/>	Marketing	Direct Mail	
<input checked="" type="checkbox"/>	Human Resources	Primary Category	
<input type="checkbox"/>	Human Resources	Training	
<input checked="" type="checkbox"/>	Human Resources	Government Regulations	
<input type="checkbox"/>	Human Resources	Hiring	
<input checked="" type="checkbox"/>	Human Resources	Compensation and Benefits	
<input type="checkbox"/>	Human Resources	Employee Retention	
<input checked="" type="checkbox"/>	Business Finance	Primary Category	
<input checked="" type="checkbox"/>	Business Finance	Financing	
<input checked="" type="checkbox"/>	Business Finance	Cash Management	
<input checked="" type="checkbox"/>	Business Finance	Investing	
<input checked="" type="checkbox"/>	Business Finance	Collection Strategies	
<input type="checkbox"/>	Business Finance	Insurance	
<input checked="" type="checkbox"/>	Personal Finance	Primary Category	
<input type="checkbox"/>	Personal Finance	Financial Planning	
<input checked="" type="checkbox"/>	Personal Finance	Retirement Planning	
<input checked="" type="checkbox"/>	Management	Primary Category	
<input checked="" type="checkbox"/>	Management	Leadership	
<input checked="" type="checkbox"/>	Management	Organizational	
<input checked="" type="checkbox"/>	Operations	Primary Category	
<input type="checkbox"/>	Operations	Inventory Management	

<input checked="" type="checkbox"/>	Operations	Computers, Technology and Networking	
<input checked="" type="checkbox"/>	Operations	Business Travel	
<input checked="" type="checkbox"/>	Operations	Purchasing	
<input checked="" type="checkbox"/>	Operations	Internal Controls	
<input checked="" type="checkbox"/>	Business Tax	Primary Category	
<input checked="" type="checkbox"/>	Business Tax	Business Succession	
<input type="checkbox"/>	Business Tax	Sale/Transfer of Business	
<input checked="" type="checkbox"/>	Business Tax	Capital Contributions and Distributions	
<input checked="" type="checkbox"/>	Business Tax	Business Expenses	
<input checked="" type="checkbox"/>	Business Tax	Retirement Plans	
<input checked="" type="checkbox"/>	Business Tax	Tax Planning	
<input checked="" type="checkbox"/>	Personal Tax	Primary Category	
<input checked="" type="checkbox"/>	Personal Tax	Wealth-Building	
<input checked="" type="checkbox"/>	Personal Tax	Retirement Planning	
<input checked="" type="checkbox"/>	Personal Tax	Insurance	
<input checked="" type="checkbox"/>	Personal Tax	Wealth Accumulation and Preservation	
<input checked="" type="checkbox"/>	Personal Tax	Filing Strategies	
<input checked="" type="checkbox"/>	Personal Tax	Tax Planning	
<input checked="" type="checkbox"/>	What's Happening?	What's Happening?	
<input checked="" type="checkbox"/>	Personal Tax	Charitable Contributions	
<input checked="" type="checkbox"/>	Sponsor Messages	Sponsor Events	
<input checked="" type="checkbox"/>	Sponsor Messages	Press Release	
<input checked="" type="checkbox"/>	Sponsor Messages	Announcement	
<input checked="" type="checkbox"/>	Create a Profit Niche With NetLedger	Create a Profit Niche With NetLedger	
<input type="checkbox"/>	Human Resources	Management/Supervision	
<input type="checkbox"/>	Business Tax	Real and Personal Property	
<input checked="" type="checkbox"/>	Marketing	Customer Loyalty	
<input checked="" type="checkbox"/>	Business Development for CPAs	Business Development for CPAs	
<input type="checkbox"/>	Using BizActions for Your CPA Firm	Using BizActions for Your CPA Firm	
<input checked="" type="checkbox"/>	CPA Practice Management Tips	CPA Practice Management Tips	
<input type="checkbox"/>	Consultant Spotlight	Consultant Spotlight	
<input type="checkbox"/>	Technology	Internet Marketing	
<input type="checkbox"/>	Technology	Equipment	





# OBERMAYER REBMANN MAXWELL & HIPPEL LLP

Philadelphia, PA Harrisburg, PA Pittsburgh, PA Cherry Hill, NJ Vineland, NJ Wilmington, DE

[Home](#) | [Firm Overview](#) | [Practice Areas](#) | [Attorneys](#) | [Contact Us](#) | [Offices](#) |

## BizActions™ for Your Employees

*Grow Your Business One Message at a Time...*

[Interests](#) | [Add Team Member](#) | [Report](#) | [New Task](#) | [Refer Associate](#) | [Unsubscribe](#) | [Feedback](#) | [Help](#) |

### Forward, Assign or Add Reminder

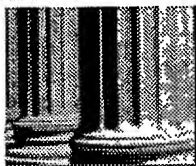
Reminder Title:	Evaluation		
BizAction ID:	BA719	Mark Completed:	<input type="checkbox"/>
Description:	Schedule semi-annual evaluations for direct hires		
Date Due:	Month <input type="text" value="11"/> Day <input type="text" value="8"/> Year <input type="text" value="2001"/>	Task Type:	<input type="text" value="Business"/>
Recurring Task?	<input type="radio"/> Annual <input type="radio"/> Quarterly <input type="radio"/> Monthly <input type="radio"/> Never		
Assign to Project:	<input type="text" value="None"/>	New Project: (Type in Name)	<input type="text"/>
Remind Me:	<input checked="" type="radio"/> Two Weeks Before <input type="radio"/> 1 Month Before	Priority:	<input type="radio"/> High <input checked="" type="radio"/> Moderate <input type="radio"/> Low
History/Notes:	<div></div>		
Assign to Team:	<input type="text" value="Select One"/>		
Forward/Copy to Team:	<input type="text" value="Select One"/>		
Forward/Copy to other:	<input type="text"/> (Enter E-mail)		

Add/Update Reminder

Reset

[Update Profile](#) | [Unsubscribe](#) | [Privacy](#) | [Disclaimer](#) | © 2000, BizActions, LLC

FIG 7



# OBERMAYER REBMANN MAXWELL & HIPPEL LLP

Philadelphia, PA Harrisburg, PA Pittsburgh, PA Cherry Hill, NJ Vineland, NJ Wilmington, DE

[Home](#) | [Firm Overview](#) | [Practice Areas](#) | [Attorneys](#) | [Contact Us](#) | [Offices](#) |

## BizActions™ for Your Employees

Grow Your Business One Message at a Time...

[Interests](#) | [Your Team](#) | [Report](#) | [Add Reminder](#) | [Refer Associate](#) | [Unsubscribe](#) | [Feedback](#) | [Help](#) |

### Your Personal Action Plan

E168

George Smith, welcome to your personal action plan. This report displays tasks based on your selections. You item history and edit any items by clicking on the 'Biz ID'.

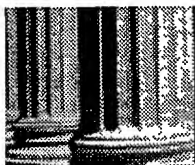
Member: George Smith

Date: Tuesday, October 30, 2001

Status: [All](#)

Type: [All](#)

Biz ID ▲	Due Date ▼	Project ▲	BizAction Title ▲	Description ▲	Priority ▲	Item Type	Assignm
<a href="#">919</a>	Sep-14-2001	None	Guard Against Losses From Employee Theft	Employee theft is a serious threat to every business. Learn how to protect your company today with these simple steps.	Moderate	Business	
<a href="#">843</a>	Sep-05-2001	None	Setup Suggestion Incentives	None	Moderate	Business	
<a href="#">842</a>	Sep-20-2001	None	Create direct mail plan	none	Moderate	Business	
<a href="#">771</a>	Aug-20-2001	None	Title	Description	High	Business	To: Sm John
<a href="#">1113</a>	Oct-18-2001	None	Make Your Sales Meetings a Three-Act Play	There's an easy way to land more clients with your sales calls. Just think of yourself as a director. Like acts in a play, your meetings should have an opening, middle and closing. Your professionalism is reflected in your ability to direct the sequence of events. Here are some guidelines.	Moderate	Business	To: Tho Bill



# OBERMAYER REBMANN MAXWELL & HIPPEL LLP



Philadelphia, PA   Harrisburg, PA   Pittsburgh, PA   Cherry Hill, NJ   Vineland, NJ   Wilmington, DE

[Home](#)[Firm Overview](#)[Practice Areas](#)[Attorneys](#)[Contact Us](#)[Offices](#)

## BizActions™ for Your Employees

*Grow Your Business One Message at a Time...*

[Interests](#)[Your Team](#)[Report](#)[Add Reminder](#)[Refer Associate](#)[Unsubscribe](#)[Feedback](#)[Help](#)

### Refer a Friend

























To refer up to ten friends or associates, enter their e-mail addresses below.

First Name	<input type="text"/>	Last Name	<input type="text"/>
E-mail	<input type="text"/>		
Title	<input type="text"/>		
Phone	<input type="text"/>		
Organization	<input type="text"/>		
Note to Associate	<input type="text"/>		

First Name	<input type="text"/>	Last Name	<input type="text"/>
E-mail	<input type="text"/>		
Title	<input type="text"/>		
Phone	<input type="text"/>		
Organization	<input type="text"/>		
Note to Associate	<input type="text"/>		

FIG 9

Welcome to the BizActions Management Center! This center provides access to all system management functions for staff, sales personnel, webmasters and BizAction management. Click on your choice to continue.

	Function	Description
<b>USING THIS SYSTEM</b>		
	1	About BizActions
	2	Ask Questions/Provide Feedback/Add New System Requirement
	3	Frequently Asked Questions
	4	Discussion Forum
	5	Help Index
	6	Knowledge Base
<b>SPONSOR REGISTRATION AND MANAGEMENT</b>		
	7	Enter Sponsor Registration and Payment Information
	8	Review/Edit Sponsor Registration Information
	9	Enter Sponsor Payment Information
	10	Review/Edit Sponsor Payment Information
	11	Create/Edit Default Member Interest Categories
	12	Upload Sponsor Logo
	13	Enter Sponsor Client/Prospect Information
	14	Review/Edit Sponsor Client/Prospect Information
	15	Generate Sample E-mail Message
	16	Review/Edit Sponsor Welcome Letter
	17	Review/Edit Sponsor Team Members
	18	Review Sponsor Agreement
<b>SYSTEM DOCUMENTATION/AIDS</b>		
	19	Access Price Data Sheet
	20	Access Sponsor Client Data File Upload Specifications
<b>SPONSOR MANAGEMENT REPORTS</b>		
	21	Summary Sponsor Registration Report
	22	Open Registrations Report
	23	Sponsor Registration Report (Sorted Chronologically)
	24	Sponsor Registration Report (Sorted Alphabetically)





























E1610

11/11/2011 10:10:10 AM





























	24	Sponsor Registration Report (Sorted Alphabetically)
<b>SALES MANAGEMENT</b>		
	25	Access Sales Script
	26	Summary Sales Report by Sales ID
	27	Payment Status Report
	28	Sales Contact Report
	29	Prospect Followup Status Report
<b>FINANCIAL REPORTS</b>		
	30	Accounts Receivable Aging Report
	31	Detailed Sponsor Payment Report
	32	Enter Payments Information
	33	Summary Revenue Report
	34	Payment Status Report
	35	Credit Card Transactions Pending Report
	36	Accounts Payable Report
<b>MANAGEMENT REPORTS</b>		
	37	Summary Sponsor Registration Report
	38	Review Feedback Comments
	39	Review Web Statistics
	40	Review Sponsor Registrations
	41	Review Member Registrations
<b>MEMBER MANAGEMENT</b>		
	42	Enter Member Registration Information
	43	Review/Edit Member Profile
	44	Member Registration Report
	45	Review/Edit Member Security Hierarchy
	46	Review Member Agreement
<b>CONTENT DEVELOPMENT</b>		
	47	Enter New BizAction Author and Send Welcome Letter
	48	Review/Edit BizAction Author Profile
	49	Author Registration Report

ECG 11







	50	Enter BizAction Items
	51	Review/Edit/Approve Public BizAction Items
	52	Review/Edit Sponsor Private BizAction Items
	53	Upload BizAction Article Files
	54	Access Full BizAction Item Record and Experts
	55	BizAction Item Master Content Report (Sorted by BizAction Type)
	56	BizAction Item Quantitative Summary Report
<b>ADVERTISING MANAGEMENT</b>		
	57	Enter Advertiser Registration and Payment Data
	58	Review/Edit Advertiser Registration and Payment Data
	59	Advertiser Registration Report
	60	Advertiser Activity Report
	61	Access Advertiser Data Sheet
	62	Modify Advertising System Parameters
	63	Review Advertiser Agreement
<b>BANNER AD MANAGEMENT</b>		
	64	Enter Banner Ad Information
	65	Review/Edit Banner Ad Information
	66	Browse Banner Ads- BizActions
	67	Browse Banner Ads- Advertisers
	68	Browse Banner Ads- Experts
	69	Browse Banner Ads-Sponsors
	70	Browse Banner Ads- Templates
	71	Purchase Banner Ad Campaign
	72	Review/Edit Banner Ad Campaign
	73	Banner Ad Impressions and Click Data Report
	74	Upload Custom Banners
	75	Request Custom Banner Ad Services
	76	Banner Ad Standards & Specifications
<b>RESOURCE MANAGEMENT</b>		
	77	Enter Expert Registration and Payment Information

F16  
12

	78	Review/Edit Expert Registration Information
	79	Create Service Profile
	80	Set Service Profile to Sponsor Assignments and Issue Invoice
	81	View/Edit Service Profiles
	82	Upload Expert Logo
	83	Upload Expert Photo
	84	Expert Registration Report
	85	Browse Expert Directory
	86	Modify Expert System Parameters
	87	Review Expert Agreement
<b>AFFILIATE WEB SITE MANAGEMENT</b>		
	88	Enter Aggregator/Web Site Affiliate Information
	89	Review/Edit Aggregator/Web Site Affiliate Data
	90	Enter Standard Pricing and Discount Codes
	91	View/Edit Standard Pricing and Discount Codes
	92	View Affiliate Report
	93	View/Edit Public Sponsor Pricing
	94	Generate Acceptance Message
<b>SYSTEM MANAGEMENT</b>		
	95	Enter/Edit Interest Categories
	96	Interest Categories Report
	97	Enter/Edit Group Types
	98	Enter/Edit BizAction Types
	99	BizAction Types Report
	100	Enter/Edit Industry Data
	101	Process Unsubscribes
	102	Change Member to Text Only Email Format
	103	Change Member to HTML Email Format
	104	Set All Sponsor Members to New
	105	Assign Sponsor Default Interests to All Sponsor Members

E16  
12

	106	Manual Launch Process
	107	View/Edit Sponsor Launch Settings
	108	Launch Settings Report
	109	New System Requirements Report

[Disclaimer](#) | 
 [Privacy Statement](#) | 
 [Feedback](#) | 
 [Press Releases](#) | 
 [What's New](#) | 
 [Copyright 2001](#)

FIG 13

106 Manual Launch Process  
 107 View/Edit Sponsor Launch Settings  
 108 Launch Settings Report  
 109 New System Requirements Report

## F16 14

### Sponsor Payment Information Entry Form

**Instructions:** This form is intended for use by sales personnel entering payment information for new sponsors. The pricing will be determined in negotiation with the sponsor. Enter the key pricing parameters here. Mandatory fields are indicated in bold.

Item		Instructions
<b>Sponsor ID</b>	<input type="text"/>	Enter the Sponsor ID. You can obtain this from the View/Edit Sponsor Profiles Report.
<b>Sponsor Name</b>	<input type="text"/>	Enter the Sponsor Organization name. Use the one above if completing that registration.
<b>Agreement Date</b>	<input type="text"/>	Enter the date of this agreement or registration Use MM/DD/YY format.
<b>Service Start Date</b>	<input type="text"/>	Enter the date that service is to commence. Billing will occur prior to that date. Use MM/DD/YY format.
<b>SERVICE OPTIONS</b>		
Sponsor Messages Only Option	No <input type="button" value="v"/>	Enter whether only sponsor messages will be included in generated messages. This is an option sometimes requested by association or company sponsors.
Private Database Option	No <input type="button" value="v"/>	Enter the separate charge for private database setup, if applicable. This option provides increased security through a separate database instance for the sponsor.
Get E-Mails Option	No <input type="button" value="v"/>	Indicate whether the sponsor wants BizActions to obtain their client e-mail addresses.
No Banner Ads Option	No <input type="button" value="v"/>	Indicate whether the sponsor wants BizActions to not include banner ads..
Free Messages Allowed	<input type="text"/>	If you provide "free" e-mails as part of the negotiation, enter them here. No charges will accrue until after this number is exceeded.
<b>PRICING INFORMATION</b>		
<b>Price Per 12 Custom Emails</b>	<input type="text"/>	Enter cost per block of 12 custom e-mail from pricing sheet.
<b>Annual System Setup and Maintenance Charge</b>	<input type="text"/>	Enter the annual system setup and maintenance charge, if any (One time charge). See pricing sheet.
Private Database Charge	<input type="text"/>	Enter the separate charge for private database setup, if applicable, from pricing sheet. (One time charge).
<b>Service Description</b>	Select One <input type="button" value="v"/>	Select a description of the number of contacts (Example "Up to 2,000")
<b>"Get Email" price per E-mail</b>	<input type="text"/>	Enter the cost per e-mail address acquisition. Billing will occur based on e-mails acquired.
<b>Any Special Notes or Agreement Terms</b>	<input type="text"/>	Enter any special agreements or terms that were negotiated. This will display on the services agreement. Enter "None", if none.
<b>Annual Subscription Charge</b>	<input type="text"/>	Enter a annual subscription charge, if any.
<b>Total Subscription and Setup/Maint. Cost</b>	<input type="text"/>	Enter the total annual subscription and setup/maint. charge.
<b>CONTACT INFORMATION</b>		
<b>Billing Point of Contact</b>	<input type="text"/>	Indicate the principal billing contact.
<b>Billing E-mail</b>	<input type="text"/>	Enter the principal P.O.C. e-mail address. This is where all bills will be sent.
<b>Billing Address</b>	<input type="text"/>	Enter billing address.

Billing City		Enter billing city.
Billing State	Select One	Enter billing state.
Billing Zip		Enter billing zip.
Billing Phone		Enter billing phone.
<b>PAYMENT INFORMATION</b>		
Payment Method	Select One	Select the payment method to be used.
Credit Card Number		Enter credit card number. Do not use spaces or hyphens.
Credit Card Type	Select One	Indicate the type of credit card
Expiration		Indicate card expiration in MM/DD/YY format.
Name on Credit Card		Indicate the name on the credit card.
Payment Interval	Annually	Indicate the desired interval for payment. Billing will occur thirty days prior to service period commencement.
Initial Deposit	0	Indicate any initial deposit amount. Cover the one time charges, at a minimum.
<b>CUSTOM PAYMENT INFORMATION (Use this section to create a custom payment profile by quarter. Note: You must have selected "Quarterly" for the payment interval above. Do not use this section for "Annual" payment intervals.)</b>		
Quarterly Payment 1 Amount	0	Enter first payment after deposit, if any. If none, leave the '0' in the fields.
Quarterly Payment 2 Amount	0	Enter second payment after deposit, if any. If none, leave the '0' in the fields.
Quarterly Payment 3 Amount	0	Enter third payment after deposit, if any. If none, leave the '0' in the fields.
Quarterly Payment 4 Amount	0	Enter fourth payment after deposit, if any. If none, leave the '0' in the fields.
Quarterly Payment 1 Date	30-Oct-01	Enter Payment Due Date for first payment. Use MM/DD/YYYY format.
Quarterly Payment 2 Date	30-Oct-01	Enter Payment Due Date for first payment. Use MM/DD/YYYY format.
Quarterly Payment 3 Date	30-Oct-01	Enter Payment Due Date for first payment. Use MM/DD/YYYY format.
Quarterly Payment 4 Date	30-Oct-01	Enter Payment Due Date for first payment. Use MM/DD/YYYY format.
<b>ADMINISTRATIVE INFORMATION</b>		
Sales Rep ID		Enter your Sales or Member ID. Important: The e-mail will not send without a valid sales member ID.

[Review Invoice](#)
[Reset](#)

E1614 (cont)

### Upload Sponsor Logo

To upload your sponsor logo, enter the information below. If you already identified a logo URL referencing your web site, you do not need to provide this information. However, we recommend that you provide the logo in case your server is inoperative and the logo file is not accessible.

Required Logo dimensions are width- 250 X height-90. Only .jpg and .gif file formats are supported.

File Name:		
File:		<input type="button" value="Browse"/>
<input type="button" value="Upload File"/>		

E16 15

## Sponsor Client Data Entry Form

**Instructions:** This form is a backup method for entering sponsor client data one record at a time. It is recommended that the sponsor send an excel file with a minimum of e-mail, first name, last name, phone, and client type instead of using this form.

You can complete this form with a minimum of the mandatory bolded fields.

Field		Instructions
Sponsor_ID	<input type="text"/>	Enter Sponsor ID. You can obtain this from the Sponsor registration report. Keep this handy if you are entering a series of names.
MP_LastName	<input type="text"/>	Enter client last name.
MP_FirstName	<input type="text"/>	Enter client first name.
MP_MemberType	<b>Business Client</b> <input checked="" type="checkbox"/>	Indicate the type of member.
MP_Email	<input type="text"/>	Enter client e-mail address.
MP_Phone	<input type="text"/>	Enter client phone.
MP_Organization	<input type="text"/>	
MP_EntityType	<input type="text"/>	
MP_Title	<input type="text"/>	
MP_Street	<input type="text"/>	
MP_City	<input type="text"/>	
MP_State	<input type="text"/>	
MP_Zip	<input type="text"/>	
MP_Fax	<input type="text"/>	
MP_UpdatedDate	<input type="text"/>	(i.e. 12/31/97)
MP_UpdatedBy	<input type="text"/>	
MP_AnniversaryDate	<input type="text"/>	(i.e. 12/31/97)
MP_EmailFormat	<input type="text"/>	
MP_Web_URL	<input type="text"/>	
MP_SecurityLevel	<input type="text"/>	
MP_LeadSponsorPOC	<input type="text"/>	
MP_MembershipRqrd	<input type="text"/>	
MP_SponsorExclusive	<input type="text"/>	
MP_CityGovt	<input type="text"/>	

E16 16

MP_CountyGovt		
MP_Industry		
MP_IndustryKeyWord1		
MP_IndustryKeyWord2		
MP_IndustryKeyWord3		
MP_SICCode		
MP_NAISCCode		
MP_POCMain		
MP_SalesVolume		
MP_NumberEmployees		
MP_YearEndDate		
MP_ReferralPOC		

Insert Data





F16 (cont)



FL617

## Sponsor Registration Entry Form

**Instructions:** This form is intended for use by sales personnel creating profiles for new sponsors. At a minimum, complete the mandatory fields that are indicated in bold below. Note the instructions next to each field. Click "submit" at the bottom of the form when complete.

Item			Instructions
<b>REQUIRED FIELDS</b>			
Organization Name	<input type="text"/>		Enter the Sponsor Organization name.
Address 1	<input type="text"/>		Enter the Sponsor address. Use a local address, if more than one division of the organization are participating.
Address 2	<input type="text"/>		Enter second address line, if required.
City	<input type="text"/>		Enter Sponsor office city
State	Select One 		Enter Sponsor office state (VA, MD)
Zip	<input type="text"/>		Enter Sponsor office zip code. Either 5 or 9 digit codes are acceptable.
Country	United States 		Select the principal country of operation.
First Name	<input type="text"/>		Specify the main point of contact first name.
Last Name	<input type="text"/>		Specify the main point of contact last name.
E-Mail	<input type="text"/>		Enter main contact e-mail address.
Phone	<input type="text"/>		Enter main contact phone number
Password	<input type="text"/>	Re-enter Password <input type="text"/>	Enter main point of contact password.
Updated Date	<input type="text"/>		Specify date that you created or updated this record.
Updated By	<input type="text"/>		Enter your sales or member ID.
CoBrand (Yes/No)	Yes 		Indicate if sponsor co-brand will be applied (Yes/No).
<b>OPTIONAL FIELDS</b>			
Fax	<input type="text"/>		Enter primary contact phone number
Industry	Select One 		Provide sponsor self-description of industry.
Referral Contact	<input type="text"/>		If this sponsor sale is a result of a referral, enter the referral name.
Logo URL	<input type="text"/>		Specify Logo URL, if known. Otherwise, this will be automatically assigned. Sponsor should provide logo measuring no larger than 200 X 80 Pixels.
<b>SPONSOR E-MAIL MENU BAR SET UP</b>			
Your Web Site URL	<input type="text"/>		Provide a Sponsor Web Site URL.

Organization Description		Provide up to 1,000 word summary description of organization. This will be used to provide a sponsor description from the cobranded e-mails.
Menu Bar Function 1 Title		Provide one to two words for first menu bar choice above your sponsor e-mail.
Menu Bar Function 2 Title		Provide one to two words for second menu bar choice above your sponsor e-mail.
Menu Bar Function 3 Title		Provide one to two words for third menu bar choice above your sponsor e-mail.
Menu Bar Function 4 Title		Provide one to two words for fourth menu bar choice above your sponsor e-mail.
Menu Bar Function 5 Title		Provide one to two words for fifth menu bar choice above your sponsor e-mail.
Menu Bar Function 1 URL		Provide a full URL path to the first menu bar choice.
Menu Bar Function 2 URL		Provide a full URL path to the second menu bar choice.
Menu Bar Function 3 URL		Provide a full URL path to the third menu bar choice.
Menu Bar Function 4 URL		Provide a full URL path to the fourth menu bar choice.
Menu Bar Function 5 URL		Provide a full URL path to the fifth menu bar choice.

Go to Step 2 | Reset






FIG 17 cont

Sponsor ID:	1
Sponsor Name:	BizActions, LLC






Barry Friedman, welcome to your sponsor management center. This center provides access to all sponsor setup management, content creation, advertising and administration functions. Click on your choice to begin:

	Function	Description
<b>USING THIS SYSTEM</b>		
	1	Using This Sponsor Center
	2	Ask Questions/Provide Feedback/Add New System Requirement
<b>SETTING UP AND MANAGING YOUR ACCOUNT</b>		
	3	Step 1: Complete Your Sponsor Profile Information
	4	Step 2: Enter/Update Your Sponsor Team Members
	5	Step 3: Set Default Member Interest Preferences
	6	Step 4: Upload Your Client/Member/Prospect E-mail Addresses
	7	Step 5: Review/Edit/Update Your Client E-mail and other Information
	8	Step 6: Upload Your Sponsor Logo
	9	Step 7: Customize Sponsor Welcome Letter
	10	Step 8: Review Sample E-mail
<b>SPONSOR REPORTS</b>		
	11	Sponsor OLAP Reports
	12	Contact Me Status Report
	13	Referral Status Report
	14	Instructions for Using OLAP Cubes
	15	Using OLAP in Your Practice
<b>MEMBER/PROSPECT MANAGEMENT</b>		
	16	Enter Client Data
	17	Send Sample E-mail to Client/Member
	18	Export Client Data
<b>ADVERTISING MANAGEMENT</b>		
	19	Enter Banner Ad Information
	20	Purchase Banner Ad Campaign







F1618

	21	Browse Banner Ads- Templates
	22	Upload Custom Banners
	23	Request Custom Banner Ad Services
	24	Banner Ad Standards & Specifications
	25	Block Banners Function

#### CONTENT DEVELOPMENT

	26	Search Public BizAction Item Database
	27	Enter Sponsor BizAction Items
	28	View/Edit Sponsor BizAction Items
	29	Specify Banners
	30	Sponsor Custom BizAction Item Report

#### RESOURCE MANAGEMENT

	31	Search Resource Directory
	32	Create Sponsor Resource Profile
	33	View/Edit Resource Profile
	34	Create Service Profile
	35	View/Edit Service Profile
	36	Resource Blocking Function

[Disclaimer](#)
[Privacy Statement](#)
[Feedback](#)
[Press Releases](#)
[What's New](#)
[Copyright 2001](#)

E1619

FILE 20

### Sponsor Registration Entry Form

Use this form to update your critical sponsor information. Your existing information is displayed below. This information includes the menu bar setup that is displayed on your custom bizactions e-mail messages. After changing the information, you can view the changes by clicking on the "Review Sample E-mail" function.

**IMPORTANT:** Note that if you change the lead point of contact information here, this will require adding the old information into the team center as a new team member if they are still to be a team member. We do not automatically retain team member information since they may have left the firm.

Item			Instructions
<b>REQUIRED FIELDS</b>			
Organization Name	BizActions, LLC		Enter the Sponsor Organization Name
Address 1			Enter the Sponsor address, if more than one address the organization has participate in
Address 2			Enter second address line
City			Enter Sponsor office city
State			Enter Sponsor office state
Zip			Enter Sponsor office zip code or 9 digit codes are accepted
Country	United States		Select the principal country of operation.
First Name	Barry		Specify the main point of contact name.
Last Name	Friedman		Specify the main point of contact name.
E-Mail	bjfriedman@ex-pressnet.com		Enter main contact e-mail
Phone	301.545.0477		Enter main contact phone
Password		Re-enter Password	Enter main point of contact
<b>OPTIONAL FIELDS</b>			
Fax			Enter primary contact phone
Industry			Provide sponsor description
Logo URL			Specify Logo URL, if known. Otherwise, this will be automatically assigned. Sponsor should be no larger than 100x100 Pixels.
<b>SPONSOR E-MAIL MENU BAR SET UP</b>			
Your Web Site URL	http://www.bizactions.com/fac/fac.htm		Provide a Sponsor Web Site URL
Organization Description			Provide up to 1,000 word description of organization used to provide a sponsor from the cobranded e-mail

Menu Bar Function 1 Title	Members	Provide one to two words bar choice above your spo
Menu Bar Function 2 Title	Sponsors	Provide one to two words menu bar choice above yo mail.
Menu Bar Function 3 Title	Experts	Provide one to two words menu bar choice above yo mail.
Menu Bar Function 4 Title	Advertisers	Provide one to two words menu bar choice above yo mail.
Menu Bar Function 5 Title	Contact Us	Provide one to two words bar choice above your spo
Menu Bar Function 1 URL	<a href="http://www.bizactions.com/frame-memcen.htm">www.bizactions.com/frame-memcen.htm</a>	Provide a full URL path to menu bar choice.
Menu Bar Function 2 URL	<a href="http://www.bizactions.com/frame-sponcen.htm">www.bizactions.com/frame-sponcen.htm</a>	Provide a full URL path to menu bar choice.
Menu Bar Function 3 URL	<a href="http://www.bizactions.com/frame-expertcen.htm">www.bizactions.com/frame-expertcen.htm</a>	Provide a full URL path to menu bar choice.
Menu Bar Function 4 URL	<a href="http://www.bizactions.com/frame-sponcen.htm">www.bizactions.com/frame-sponcen.htm</a>	Provide a full URL path to menu bar choice.
Menu Bar Function 5 URL	<a href="http://www.bizactions.com/contactus/frame-contactus.htm">www.bizactions.com/contactus/frame-contactus.htm</a>	Provide a full URL path to menu bar choice.

Update Sponsor Profile

Reset

~~2~~  
F16 (cont)  
20

### Upload Client Data

To upload your client list data file, enter the information below. Important: Please note that the file will overwrite the previously uploaded file. Make sure your file is cumulative or updated. We do not insert this uploaded data into the database automatically. All files are screened and manually formatted because of data format requirements. The minimum required fields in your client data file are (in the following order):

- First Name
- Last Name
- E-mail
- Phone:
- Member\_Type: Identify Personal Client, Business Client, Prospect, Referral
- Sponsor Point of Contact (Note: The point of contact must be added as a team member for the system to route contact requests to this individual)


Acceptable file types are excel (.xls), access (.mdb) or tab delimited text file (.txt).

File:	<input type="text"/>	<input type="button" value="Browse"/>
<input type="button" value="Upload File"/>		

File 21

**Banner Data Entry**

Enter a profile for each banner that is to be used in the system. You will also need to upload the banner using the "Banner" function.

Item	Entry Field	Instructions
<b>Mandatory</b>		
Sponsor_ID	<input type="text"/>	Use the sponsor ID that created the banner, if this is a sponsor banner. If not, leave blank. If the use Sponsor ID 1, which is the BizActions sponsor ID number.
Expert_ID	<input type="text"/>	Use the expert ID that created the banner, if this is an expert banner. If not, leave blank.
Advertiser_ID	<input type="text"/>	Use the advertiser ID that created the banner, if this is an advertiser banner. If not, leave blank.
Banner_Type	Select One 	Select the banner type. This choice will determine how and where the banner is displayed.
FileNameURL	<input type="text"/>	Indicate the file name for banner, if applicable.
AdServerURL	<input type="text"/>	If this is an ad server banner, enter a URL reference with variables to the ad server.
BannerURLRef	<input type="text"/>	Indicate the URL for banner click through page, if applicable.
Date_Updated	<input type="text"/>	Enter Date Recorded Created
Updated By	<input type="text"/>	Enter ID for individual entering data
<b>Non Mandatory</b>		
Banner_Title	<input type="text"/>	Enter a short descriptive title for banner.
Banner_Description	<input type="text"/>	Enter an extended description of the purpose of banner, especially if this is a templated banner
Banner_MoreInfo	<input type="text"/>	
Banner_POC	<input type="text"/>	Enter Developer point of contact. Use bizactions point of contact if this is for a bizactions or tem
Banner_POC Email	<input type="text"/>	Enter Developer e-mail. Use bizactions e-mail if this is for a bizactions or templated banner.
Banner_POC Phone	<input type="text"/>	Enter Developer phone. Use bizactions phone if this is for a bizactions or templated banner.







**Insert Data**

E16 22



Partner ID:	1
Partner Name:	Accounting Web

Ryan Carmen, welcome to your partner management center. This center provides access to all partner setup, management administration functions. Click on your choice to begin:

	Function	Description
<b>Using this System</b>		
	1	Using this Partner Center
	2	Ask Questions/Provide Feedback/Add New System Requirements
<b>Setting up and Managing Your Account</b>		
	3	Upload Your Partner Logo
<b>Affiliate Reports</b>		
	4	Partner Summary Report
<b>Affiliate Management</b>		
	5	Select Banners or Advertorials
	6	Preview Your Banner Landing Page

<a href="#">Disclaimer</a>	<a href="#">Privacy Statement</a>	<a href="#">Feedback</a>	<a href="#">Press Releases</a>	<a href="#">What's New</a>	<a href="#">Copyright 2001</a>
----------------------------	-----------------------------------	--------------------------	--------------------------------	----------------------------	--------------------------------

FIG. 23

**Partner Report**

Date:	Tuesday, October 30, 2001
Partner ID:	1
Partner Name:	Accounting Web
Contact Person:	Ryan Carmen
Phone Number:	

FIG 24

Select the desired period			Instructions
Period	All	to All	Use M/DD/YY format.
Channel	All		Select One.
Display Report			Reset

**Partner Activity**

Period	Banners				Impressions	Click Throughs	Ratio
	Description	Size	ID	Location			
Jan	Get More Clients	468X60	100	Email 1	100	20	0.20
	Get More Clients	468X60	100	Email 2	150	30	0.20
	Built by CPAs	468X60	101	CT - More Info	200	10	0.05
	Built by CPAs	468X60	101	CT - Resources	300	20	0.07
	More Business	468X60	102	CT - Resources	100	5	0.05
					850	85	0.10
Feb	Get More Clients	468X60	100	Email 3	200	15	0.08
	Get More Clients	468X60	100	CT - More Info	150	15	0.10
	Built by CPAs	468X60	101	Email 1	100	20	0.20
	More Business	468X60	102	Email 2	100	2	0.02
	More Business	468X60	102	Email 3	550	52	0.09
					1200	100	.11
March	Get More Clients	468X60	100	Email 2	200	50	0.25

	Built by CPAs	468X60	101	Email 3	200	20	0.10
	More Business	468X60	102	CT = Resources	200	20	0.10
					600	90	0.15
Total					2,000	227	0.11

F16 24 cont.